



National
Capital Region

Wired: Evaluating
Settlement Online (WESO)



Quality Assessment Toolkit for Hybrid Settlement Services in Canada: **Appendix I**

Readiness Assessment Tools

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Introduction

This document provides two supplementary tools to support the implementation of the Quality Assessment Toolkit for Hybrid Settlement Services in Canada.

The two tools included in this document are:

1. Assessing Client Readiness for Hybrid Services
2. Assessing Organizational Readiness for Hybrid Services

Each tool includes:

- An overview of its purpose
- Instructions on how the tool can be used
- Templates that you can adapt and apply in your organization.

For more information on the WIRED: Evaluating Settlement Online (WESO) project and the YMCA of the National Capital Region, please visit www.ymcaottawa.ca



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Assessing Client Readiness for Hybrid Services

Purpose

Use this checklist to assess client readiness to receive service in a hybrid service delivery approach. The checklist captures information that will assess the client readiness in three dimensions, including:

1. Technological readiness
2. The barriers that clients may have to access hybrid services
3. Their comfort level with the hybrid environment

This checklist is meant to be used to complement your existing intake and needs assessment surveys, interviews, etc. You may choose to use this checklist separately or incorporate some or all of the suggested questions into your upgraded intake or needs assessment processes.

Administering the Checklist

This checklist is best administered in a live/synchronous conversation (whether in-person or online) between staff and client. This is because some questions may require clarification. Depending on your client's answers, you may want to follow up to ensure you fully understand how ready they are.

Considerations

Before asking the questions, provide an overview of what and how the hybrid service will be provided. Each time a client accesses hybrid services in your organization, the service approach may be different. It is important that the client fully understands how each particular service will be offered, especially if they are accessing multiple services from your organization (whether at the same time or in the future). For example, Settlement Services may be offered in a flexible way, where the client can request in-person or virtual meetings with their Settlement Worker at any time, based on preference or need. They may then access a job search program you offer, which may comprise an 80% online, 20% in-person schedule (such as 1 day a week in-person, with the rest of the program being offered online using synchronous and asynchronous approaches). Each service should carry the client through a readiness checklist, whether formally or informally, to determine readiness.



Tool: Client Readiness for Hybrid Services Checklist

Technological Readiness

Readiness Questions	Yes/No	Comments
Does your client have a device with a reliable high-speed internet connection?		
Does their device work well enough to join a video conference meeting?		
Does their device have the software needed to log into video conference meetings (Zoom, Google Meets, or Teams)?		
Does your client have the basic skills to operate their device and log in to the video conference?		
Does your client <u>only</u> have mobile phone access (no laptop or tablet)?		
Does your client feel comfortable having a conversation via video conferencing?		

Barriers

Readiness Questions	Yes/No	Comments
Does your client prefer a provider with a specific language or cultural background?		
Is transportation to your services an issue for your client?		
Does your client need services to be accessible for the hearing or visually impaired?		



What challenges does your client encounter during online service delivery?

Check all that apply.

Training (Digital/Language)

- Not knowing how to use online services
- Not having someone to teach them how to use technology
- Language barrier

Awareness/Time

- Not aware of online settlement services
- Not having the time to learn

Financial Expenses/Internet Connection

- Laptop/phone is too expensive
- Internet is too expensive
- Having slow internet connection

Personal Preference

- Enjoying in-person social interaction
- In-person services are faster and more efficient
- Long waiting times for an online appointment
- Online delivery is boring
- Not feeling comfortable using technology

What resources would be useful for the client to access services? Check all that apply.

- Computer/Digital Training
- Device lending
- High-speed internet access
- Language Classes

Additional Comments:



The Hybrid Environment

Readiness Questions	Comments
What was the client’s experience receiving hybrid services?	
What kinds of services does the client consider better done in-person than online?	
Is your client ready for the first appointment to be in virtual mode, or do they prefer it to be in person?	Virtual first-time visit/In-person first visit
What other service options are available that meet their preferences and needs?	

Additional Comments:



Assessing Organizational Readiness for Hybrid Services

Background

The organizational readiness for hybrid services depends on the digital maturity of the settlement organization. Digital maturity and digital transformation are two closely related terms. Digital transformation is not only about implementing new technologies but is also an ongoing active process that adjusts the organization's technology, business model, culture, and staff to reach the required digital transformation level. Digital maturity, on the other hand, describes the company's status in achieving digital transformation goals¹.

Why digital transformation is important:

The advantages of digital transformation include supporting an organization's resilience against external risks like natural disasters and disease outbreaks², stimulating innovative thinking to enhance and revolutionize service models³, and enhancing flexibility to respond to uncertainties in innovative ways⁴.

Organizational Change Readiness

As seen in [Figure 1](#), Organizational Change Readiness (OCR) theory includes 4 dimensions related to readiness for organizational change which include⁵:

- Motivational Readiness measures the need and the willingness to offer hybrid services.
- Institutional Resources readiness measures the resources needed for offering hybrid services.
- Staff Readiness measures the staff's readiness to offer hybrid services.
- Organization Leadership and Culture includes leadership support and flexibility of the organization to change business models and adapt to new processes related to hybrid service delivery.

¹ Fletcher, G., & Griffiths, M. (2020). Digital transformation during a lockdown. *International journal of information management*, 55, 102185.

² He, Z., Huang, H., Choi, H., & Bilgihan, A. (2023). Building organizational resilience with digital transformation. *Journal of Service Management*, 34(1), 147-171.

³ Fletcher, G., & Griffiths, M. (2020). Digital transformation during a lockdown. *International journal of information management*, 55, 102185.

⁴ Fletcher, G., & Griffiths, M. (2020). Digital transformation during a lockdown. *International journal of information management*, 55, 102185.

⁵ Lehman, W. E., Greener, J. M., & Simpson, D. D. (2002). Assessing organizational readiness for change. *Journal of substance abuse treatment*, 22(4), 197-209.



Figure 1: Dimensions for Organizational Readiness



Tool: Assessing Organizational Readiness for Delivering Hybrid Settlement Services

Purpose

Use this checklist to assess your organization’s readiness to deliver service using a hybrid service delivery format.

The checklist captures information that will help assess your organization’s readiness in the four dimensions (see [Figure 1](#)).

Administering the Checklist

This checklist can be administered or initiated by any team member at your organization.

First, read through each statement and identify which you agree with, and which areas need intervention.

Once complete, take this tool to other team members or colleagues and have an open discussion about where your strengths are and where attention is needed.

The discussion could include identifying the current realities in your organization and what can be practically done to increase readiness.

Considerations

In thinking about areas that need an intervention, it is important to consider what initiatives or decisions might be out of your control, such as funding limitations, policy change, etc. However, openness about such matters is important and may encourage innovation from all levels across your organization to overcome any obstacles and shift expenses as needed.

Dimension 1: Motivational Readiness

Statement	Agree	Needs intervention
Providing hybrid services brings benefits to my organization.		
Providing hybrid services brings benefits for clients.		
Providing hybrid services brings benefits for staff.		



Dimension 2: Institutional Resources Readiness

Statement	Agree	Needs intervention
My organization’s website shares and communicates information in a strategic, well-organized, and informative way to support hybrid service delivery.		
IT systems in place are effective and support hybrid services.		
There is enough budget to support new types of expenses such as special software costs and updated equipment such as headphones.		
Data generated from operations are used to assess budget, plan capacity, and improve services.		

Dimension 3: Organizational Leadership and Culture

Statement	Agree	Needs intervention
Organizational leadership encourages innovative ways to serve customers in a hybrid manner.		
My organization has a clear strategy to promote digitization including the delivery of hybrid services.		
There are clear role assignments for digitization of settlement services.		
Organizational leadership views hybrid work arrangements as an opportunity to reduce staff costs, reduce office space, and increase staff loyalty.		
Creative ways and new ideas to serve clients are welcome in my organization.		
There is a real commitment from my organization to continue and progress hybrid services.		
We have an open-door policy where staff have a clear communication channel with the organization leaders.		



Dimension 4: Staff Readiness

Statement	Agree	Needs intervention
Staff have the technological skills needed for hybrid services.		
Staff are ready and able to provide online services after pandemic.		
Staff have the equipment needed to offer hybrid services.		
Staff are ready and able to seamlessly move service delivery between in-person and online/remote interactions with clients.		
Staff are open to trying, reflecting upon and learning from new experiences and have the capacity to learn in order to experiment and work with change related to hybrid services.		
Staff understand and are able to operate legally, ethically and safely in a hybrid service model.		

Improving Organizational Readiness

The following are suggestions to improve organizational readiness and encourage digital transformation to deliver quality hybrid services.

1. Create a digital transformation strategy that includes staff, systems, and processes.

A digital transformation strategy may include the following elements:

- A map of how hybrid services are delivered to clients. The map should include a list of online services provided with a process flow diagram related to each service. The process flow diagram includes the whole service delivery supply chain from the moment a client registers for the service online until the service is delivered. The process should also contain how client data is collected, stored, used, and secured.
- Make a list of challenges faced during hybrid service delivery.
- Consult with staff on how to overcome challenges and improve the delivery of hybrid services.



- Collaborate with IT to identify system requirements and new service delivery methods.
- Collaborate with funders to identify the budget needed for hybrid service delivery.
- Create a roadmap for all changes needed to offer hybrid services including service models, people, budgets, and office space changes.

2. Assign an owner for the digital transformation strategy.

- Assign responsibility for planning and execution of the digital transformation strategy to specific departments or positions.
- Set clear goals and timelines for digitizing services.
- Assigning roles and responsibilities and setting timelines are critical to ensure that all teams are invested in and impacted by the transformation, are aligned with the digital transformation strategy and that change is managed appropriately.

3. Co-design digital transformation with staff.

- Provide open discussions and listen to staff about how they see the workflow and their views of hybrid work.
- Support hybrid work arrangements and create new processes for staff accountability.
- Invest in staff technical skills.

4. Change can be challenging, and plans need to be flexible to address issues as they arise.

- Reduce office space if needed and transfer rent expenses to innovation expenses.
- Consider changing all service models including services and programs offered.

5. Use data generated from operations in decision-making.

- Data collected during service delivery can guide SPOs on what services to offer online vs. in person.
- Client feedback will help spot areas of service excellence and areas of weakness to improve hybrid service quality.





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